

Personal Financial Statement

Statement Date: _____

Complete this form for each applicant. List only those assets you want to be considered in this personal financial statement.

Personal Information

Name	Home Phone
Address	Mobile Phone
City, State Zip	Email Address

Section I – Summary Information

ASSETS	LIABILITIES
Cash in Banks:	
Investment Accounts:	
Real Estate Owned:	Real Estate Debt:
Other Assets:	Other Debt:
TOTAL ASSETS:	TOTAL LIABILITIES:
	NET WORTH:

Source of Income (Annually)	Expenses (Annually)
Salary	Taxes
Bonuses & Commission	Debt Obligations
Investment Income	Investment Expense
Real Estate Income	Real Estate Expense
Other Income	Other Expense
TOTAL INCOME	TOTAL EXPENSES

Section II – Detailed Information

A. Cash in Banks

Name of Bank	Type of Account	Ownership	Balance
TOTAL			

